

The Road to a 2025 Total Force:

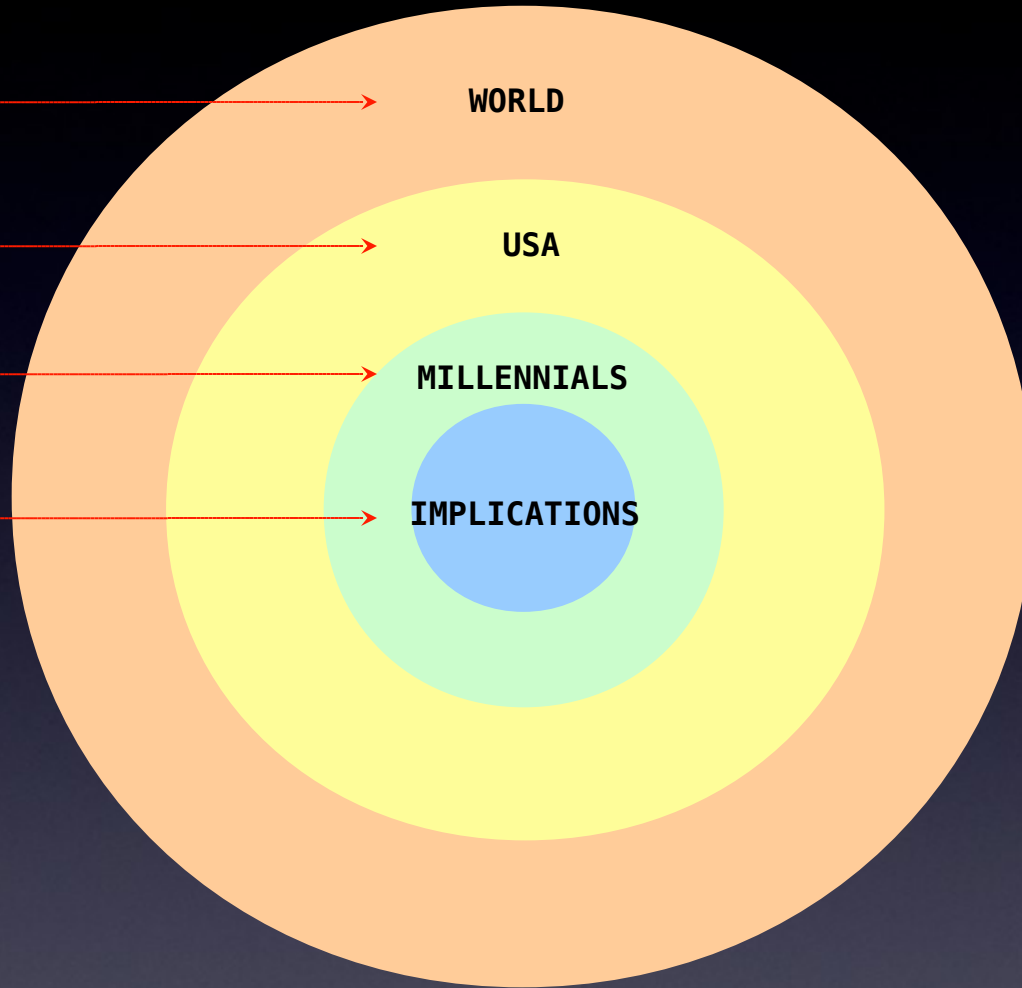
Talkin' 'bout their
generation

Welcome to the Real World



Agenda

1. → **WORLD**
2. → **USA**
3. → **MILLENNIALS**
4. → **IMPLICATIONS**



World vs US Trends

World population trends

World population in 2007 : 6.6 billion

World population in 2015 : 7.2 billion

	2007	2015
Asia	3.67 bn (60.6%)	4.14 bn (60.7%)
Africa	0.80 bn (13.2%)	0.99 bn (14.6%)
N.America	0.48 bn (8.05%)	0.54 bn (7.90%)
S.America	0.34 bn (5.70%)	0.39 bn (5.70%)
Europe	0.73 bn (12.0%)	0.72 bn (10.6%)

Source : U.S Census Bureau

US population trends

Our target group will grow more slowly than the rest of the population

	2000	2015	%Growth
Total pop		281 mn	322 mn
	14%	17-24 yrs	
31.18 mn	34 mn		9%

Economic trends

Sustained GDP growth in Asia Pacific region

	2001-5	2006	2007 (f)	2008 (f)
China	9.5 %	10.5 %	9.4 %	
India	6.8 %	8.5 %	7.5 %	
Europe	2.9 %		2.4 %	2.4
U.S	3.3 %		2.8 %	3.0

Source : ETU Data, EDC Economics

Employment trends

Most Rapid Growth : Service sector
Most Declining Growth : Manufacturing
Sector

Education and Health services are projected to grow faster than any other sector (30.6%)

- ▶ About 3/10 new jobs created in the U.S will be in Healthcare and Social assistance or private Educational services sectors

- ▶ Service providing industries are expected to account for approximately 18.7 million of the 18.9 million new wage and salary jobs generated over the 2004-2014 period

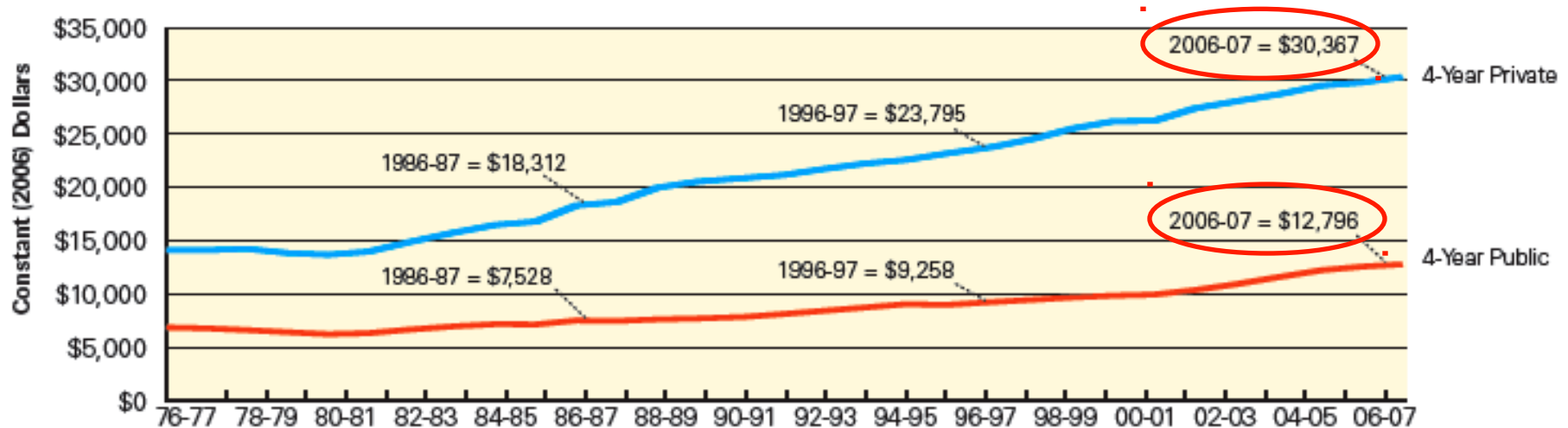
Employment trends

Professional and related occupations will grow the fastest and add more new jobs than any other major occupational group

- ▶ About 3/4th of the job growth will come from three groups of professional occupations
- ▶ Computer and Mathematical occupations
- ▶ Healthcare practitioners and technical occupations
- ▶ Education, Training and Library occupations

College trends

Current Average Yearly Tuition, Fee, Room, and Board charges at 4 - year Institutions



Source: CollegeBoard

College trends

Total Private Four year college expenses : \$179,460

If forecasted @ 5% until 2015

Total Public Four year college expenses : \$

Academic Year	Total Charges—Current Dollars				Total Charges—Constant (2006) Dollars			
	Private Four-Year	Annual % Change	Public Four-Year	Annual % Change	Private Four-Year	Annual % Change	Public Four-Year	Annual % Change
96-97	\$18,357		\$7,142		\$23,795		\$9,258	
97-98	\$19,360	5%	\$7,469	5%	\$24,549	3%	\$9,471	2%
98-99	\$20,463	6%	\$7,769	4%	\$25,535	4%	\$9,695	2%
99-00	\$21,475	5%	\$8,080	4%	\$26,204	3%	\$9,859	2%
00-01	\$22,240	4%	\$8,439	4%	\$26,243	0%	\$9,958	1%
01-02	\$23,856	7%	\$9,032	7%	\$27,404	4%	\$10,375	4%
02-03	\$24,867	4%	\$9,672	7%	\$28,060	2%	\$10,914	5%
03-04	\$26,057	5%	\$10,530	9%	\$28,781	3%	\$11,631	7%
04-05	\$27,465	5%	\$11,376	8%	\$29,552	3%	\$12,240	5%
05-06	\$28,743	5%	\$12,115	6%	\$29,841	1%	\$12,578	3%
06-07	\$30,367	6%	\$12,796	6%	\$30,367	2%	\$12,796	2%

Millennials: About them

A Quiz

1) Name a lead singer for the Black Eyed Peas

2) Who said "Don't be jealous because I've been chatting online with babes all day"

3) Who hosted the 2006 MTV Video Music Awards?

4) What is an emoticon?

5) Billie Joe Armstrong is the lead singer for which band?

6) Who is Shiloh?

7) What is Bolt?

8) Who are two main characters on "*Degrassi the Next Generation*"?

The Answers

- 1) Will.I.am or Fergie
- 2) Kip Dynamite
- 3) Jack Black
- 4) :) :>) /:>(etc.
- 5) Green Day
- 6) Brangelina's baby
- 7) A social networking site with 10.9 million unique visitors per month.
- 8) Emma Nelson, Jimmy Brooks

The youth of tomorrow

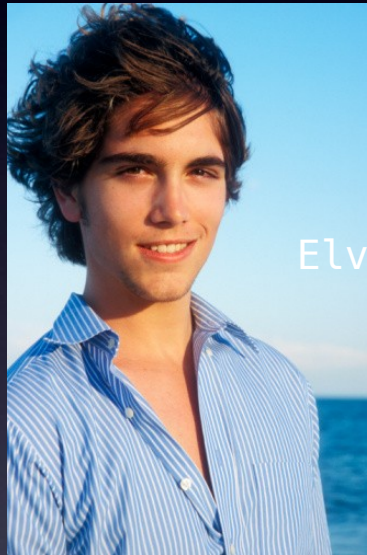
One electronic device He has always been online
does it
all: TV, Internet,
Phone, Music, Data,
Computing

His buddy list
spans the globe.
Best friend may be
Chinese

Has never seen a film
camera
WW1 started a nearly a
century before he was born
(For Boomers, Civil War
started a century before
birth)

There have always been
hybrid cars

There has always
been one Germany



He's always been able to
watch wars and revolutions
live on TV and the internet

Elvis died 20 years before he was born

Satellite radio has been around
since he was 5

He has only known two
presidents

Has never known a world without
digital phones or DVDs

Soviet Union fell 7 years
before he was born

Their formative years

- ▶ A series of violent acts occurred during their formative years
 - ▶ Oklahoma City bombing
 - ▶ Columbine High School shooting
 - ▶ Other school shootings
 - ▶ 9-11
 - ▶ D.C. sniper

Parent Advocacy

- In the decades right before and after the Millennium, Americans moved the spotlight onto kids and their families
- Protective parents tried to ensure that their children would grow up safely and be treated well
- This generation actually likes their parents, somewhat of a departure from previous generations
 - When young people were asked whom they admired, 'Mom and Dad' were named most often

Scheduled, Structured Lives

- Millennials are the busiest generation of children ever
- Take part in so many activities, schedules are micromanaged
- Soccer camp, karate club, ballet, football, etc...
- They need a planner before middle school

Collaborative decision making with parents

Becoming less about taking sides and more about better understanding each other's motivations and preferences

- 90% call their relationship with their mother close; 65% described a close relationship with their father



A “Coddled” Generation

- Raised by active, involved, “Helicopter” parents
- Who challenge poor grades, negotiate with soccer coaches, visit college campuses, question employers, etc....
- “Boomerang Kids”

The Most-Praised Generation

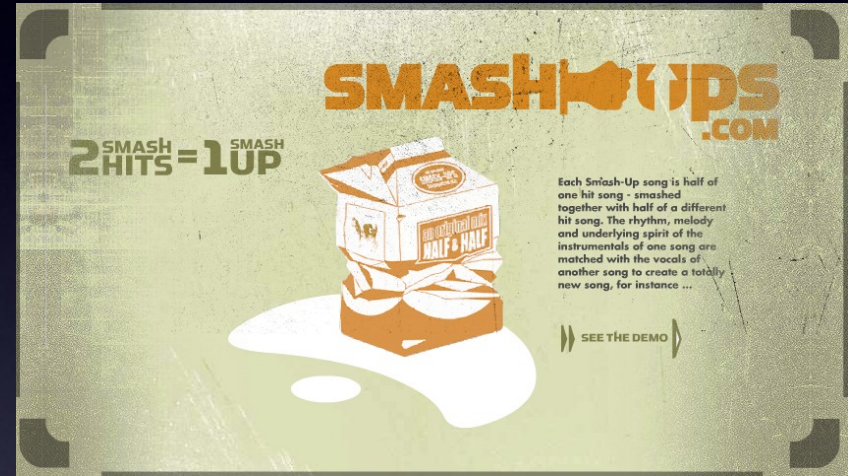
- These kids grew up hearing nothing but praise, all the time, everywhere
- Recent childhood has been defined by ego-stroking
 - Soccer trophy syndrome...I am special
- Can get disgruntled if not praised

**Yet
extraordinarily
accomplished.**

Globalism

- Millennials grew up seeing everything in the world as:
 - Global
 - Connected
 - Open for business 24/7

Fusion Lifestyle. They sample aspects of different cultures and integrate them into their lifestyle
80% have close friends of a different race or ethnic origin



Everything is influenced by more than one culture and style

Personal Goals. Pressure to succeed has become more internally focused.

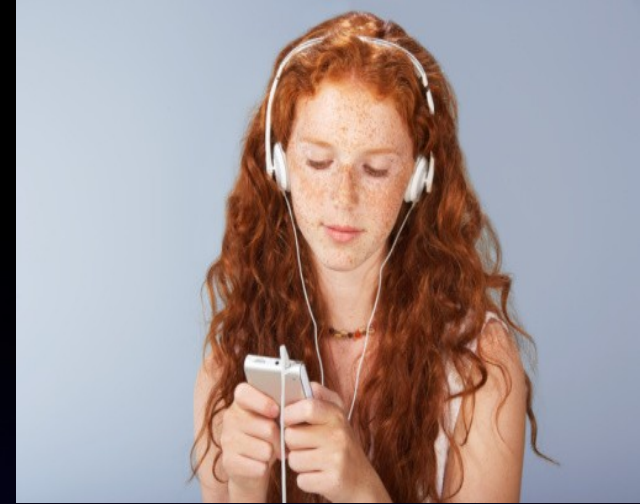


A shift towards meaningful achievements in life.

Traditional lifestyles & experiences are now within the reach of a majority of them.

Source : Yankelovitch 2006

the
stuff they already have
and are
saying to themselves..



*"There must be
something
more out there."*



Being successful means...



Claiming Ownership



Being close to
family & friends

Source : Yankelovitch 2006



Failure means...



Not finding
your passion



Not being true
to yourself



Compromising
your
integrity

Source : Yankelovitch 2006

COLLEGE. They are taking longer to graduate

- Only 37% of first-time freshmen at four-year schools earned their bachelor's degrees in four years
 - Another 6% took up to six years



Work can wait

- They are not in a hurry to launch careers just out of college
 - Many travel and take jobs unrelated to their schooling
 - They have been raised in a climate that emphasized the importance of high self-esteem, making them to appear to challenge the boundaries of corporate behavior
- “When they have a problem in the workplace, they walk.”

– Neil Howe, co-author of
'Generations'

Displaying Civic engagement

- A spirit of volunteerism and interest in the world around them
- They are applying to service organizations such as AmeriCorps and the Peace Corps in record numbers
- 66% of freshmen surveyed last fall said it is “essential or very important” to help others, the highest percentage to say so in 25 years



This generation lives in a world of dichotomies

- Confident...
 - Yet yearn for praise
- Demand respect...
- Expect to achieve now...
 - Without experience
 - But move back home after college

We must be aware of these dichotomies, and how they affect the mindset of millennials

Millennials, Technology and a new Generation Gap

How technology is shaping their lives
and their perception of the world around them

They are Media Junkies

And they are “media multitasking”

- ▶ Through media multitasking kids are spending 6.5 hours a day with media, but are packing more than 8.5 hours worth of exposure into that time
- ▶ Younger kids have more and more media devices; of those 8-14 years old
 - ▶ 39% have cell phones
 - ▶ 24% have a hand-held Internet device or PDA
 - ▶ 12% have a laptop computer
- ▶ 26% of the time young people are using media, they are using more than one medium at a time

A mindset of “Continuous partial attention”

Share of
24 million
U.S. teen
who:

87%

Use the internet

65%

Instant Message (IM)

44%

Go online every day

29%

Keep several IM
Conversations going at
once

29%

Have more than 50
“buddies” on regular IM
list

25%

IM people in the
Same room

It's 7 PM on a Friday. Adam has just sweated his way through his class assignment. (The assignment is “*Totally out of control*” writes Adam on his on-line school message board minutes later. He then checks a friend's blog entry on MySpace.com to find out where a party will be that night. Then he starts an Instant Messenger (IM) conversation about the evening's plans with a few pals

At the same time, his girlfriend IMs him a retail store link to see a new PC she just bought, and he starts chatting with her. She is posterizing for the next Buzz-Oven concert by tacking the flier on various friend's MySpace profiles, and she is updating her own blog on Xanga.com, another social network she uses mostly to post photos

Adam's TV is set to TBS, which plays a steady stream of reruns like Friends and Sienfield - but he keeps the volume turned down so he can listen to iTunes over his computer speakers.

Source : Pew Internet Research

Simultaneously, he is actually physically talking to dorm mate Jim

Teens are creating new forms of social behavior that blur the distinction between online and real-world interactions.

And largely ignore the difference between the two

Adults

see the Web as a supplement to their daily lives

tap into information, buy books, or send flowers, send and check emails

social lives remain rooted in the traditional phone call and face-to-face conversation

Teens

live comfortably in both worlds at once.

use social networks as virtual community centers, a place to go and sit for a while (sometimes hours).

use their computers for activities such as social networking on average, 1 hour and 22 minutes a day, a nearly

"I tell my students not to treat me like TV. They have to think of me like a real person talking."

– University of Wisconsin professor Aaron Brower

Creating a whole new language

MySpacer : suuuuuuup!!! (Translation:
What's up?)

Self : wat up dude

MySpacer : nmU (Translation: Not much.
You?)

Self : same

MySpacer : went 2 Arctic Monkeys
concert

Self : omg!!! (Translation: Oh my
god)
This is not about just a generation gap, but
dealing with
a somewhat alien life force.

Fiercely uninhibited. Large parts of their lives end up being online and public, a constant surprise for those in their 30s and above.

Meet Caitlin Oppermann



caitlin.oppermann

INSTANT MESSAGE
She talks to her friends online. Even when she's offline, her "Away" message often lets a viewer know where she is.

- caitlin oppermann
email/text/IM.
- caitlin oppermann
News Hour borefest
- caitlin oppermann
AP Eng. vocab test, AP Gov. test, getti...

All kinds of opportunities – romantic,
professional,
creative – all seem to be directly linked to
their willingness
to reveal themselves online

WEBSITE
Caitlin designed her own Website last year. It includes a blog and links to her photos and videos.

VISIT MY SITE

|contact|
aim: caitlinoppermann
caitlinoppermann@yahoo.com

|languages|
english (native)
french (proficient)
chinese (novice)

Hello, I'm Caitlin.
January 6th, 2007 · No Comments

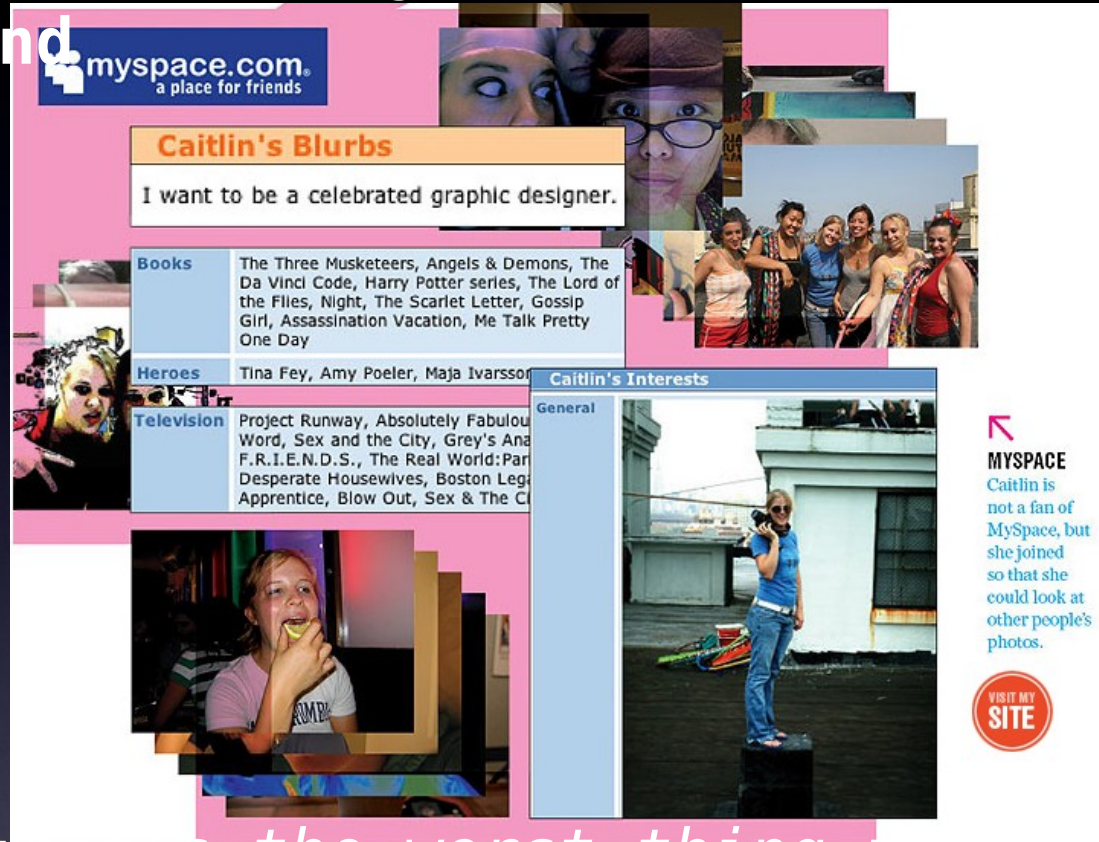
I would like to share some facts.

I like the color green.
My brain is freakishly good at storing information. Especially interesting historical tidbits and cool statistics.
My heart has a soft spot for New York.
I (sadly, I guess) think of my PowerMac and my Powerbook as loyal companions, as they seem to carry me through the weeks.

I'm probably the easiest person to contact in the entire world.

"You're getting what you're being"

It is a form of communication where **they** are aware that anything that they say can and will be used against them, but **somehow** don't mind.



MYSPACE
Caitlin is
not a fan of
MySpace, but
she joined
so that she
could look at
other people's
photos.



"Why not? What's the worst thing that is going to happen?

20 years down the road, someone's gonna find your picture?

Just make it sure it's a great picture"

They think of themselves as having an audience

VIMEO
Her videos include scenes of her hula-hooping in Washington Square Park and a clip in which she asks for feedback on her new haircut.

VISIT MY SITE

Emails are my favorite thing. Go for it!
caitlinopperman@yahoo.com

IM me: caitlinoppermann

vimeo

Clip Total: 70 / Appears in: 41 / Likes: 783 / Contacts: 92

Activity on Your Clips (Newer / Older)

	Today	Mon	Sun	Sat	Fri	Thu	Wed
Activity	Low	Medium	High	High	Low	Medium	High

Your Clips (Newer / Older)

	Clip 1	Clip 2	Clip 3	Clip 4	Clip 5
LIKES	16	11	14	21	6
COMMENTS	26	12	12	8	19
VIEWS	227	250	291	350	549

“I always find myself more motivated to write things, when I know that somebody, somewhere, might be reading it.”

They feel they are only one step away from fame



"To me, or to a lot of people, its like, why go to a party if you're not going to get your picture taken?"

It's theater, but it's also community

The image is a collage centered around a Facebook profile for Caitlin Oppermann. The profile is titled "facebook" and "Caitlin Oppermann's Profile". It includes personal information: Sex: Female, Relationship Status: Single, Birthday: May 17, 1989, and Political Views: Very Liberal. Contact information is listed as Email: caitlinoppermann@yahoo.com and Mobile: 913.515.6440. A "Courses" section lists: 1. AP Calculus AB (Obenhaus), 2. English (Greiner), 3. Organic Chem (Reist), 4. Government (Cotsworth), 5. Drawing 3 (Trapp), 6. Distinguished Scholars Visual Arts (Trapp), 7. Chinese II (Lin), and 8. AP Portfolio (Trapp). A "Mini-Feed" shows a comment from Caitlin on John Oppermann's note about a mortgage, dated January 29. Other feed items include Caitlin being ecstatic about MICA (January 29), Caitlin joining the group (January 25), and Caitlin planning to attend Julia's Sweet 16 (January 24). A text box in the center lists activities: "ON Stuco, NHS, Faraday Society, dancing, Check The Pockets 2006, traveling, designing, socializing, tennis, hooping!, talking, taking photos & videos, scribbling, ON Tennis". A red circular button says "VISIT MY SITE". The collage also features several photographs: a portrait of Caitlin, a group of three people, and a close-up of Caitlin with a mustache drawn on her face.

facebook
Caitlin Oppermann's Profile

Sex: Female
Relationship Status: Single
Birthday: May 17, 1989
Political Views: Very Liberal

Contact Info
Email: caitlinoppermann@yahoo.com
Mobile: 913.515.6440

Courses

- 1. AP Calculus AB (Obenhaus)
- 2. English (Greiner)
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Mini-Feed
Displaying 10 stories. See All

Yesterday
Caitlin commented on John Oppermann's note a mortgage on your dorm room? 8:00pm

January 29
Caitlin is ecstatic...because she got into MICA. 6:15pm

January 25
Caitlin joined the group 11:23pm

January 24
Caitlin plans to attend Julia's Sweet 16, 4:52pm

ON Stuco, NHS, Faraday Society, dancing, Check The Pockets 2006, traveling, designing, socializing, tennis, hooping!, talking, taking photos & videos, scribbling, ON Tennis

FACEBOOK
Caitlin's page links to 91 friends at her high school. Her "feed" displays the latest news as she edits her profile.

VISIT MY SITE

A place to think out loud and be listened to,
to meet strangers and go deeper with friends

They feel the possibilities are endless—
and no qualifications are required

“TILA TEQUILA
THE **MADONNA** OF MYSPACE”
- Time Magazine



1.5 million MySpace
friends

Profile viewed
>50 million times

3,000-5,000 new friend
requests per day

A celebrity created not by a studio or a network
but fan by fan,
click by click, from the ground up on MySpace

These Kids!

An adult's voice over
They have no sense of shame. They have no sense of privacy.

They are show-offs, fame whores, pornographic little loons who post their diaries, their phone numbers, their stupid poetry - for God's sake, their dirty photos! – online. They have virtual friends instead of real ones. They talk illiterate instant messages. They are interested only in attention—and yet they have zero attention span, flitting like hummingbirds from one virtual stage to another.

These Adults!

A kid's voice over

Whenever we are allowed to indulge in something you are not allowed to, it makes you bitter.

What did you have? The mall and the parking lot of the

7-Eleven? It sucked to grow up when you did! And you

are mad about it now. You are always eager to believe that your behavior is a matter of morality, not chronology.

(But the truth of the matter is) you didn't behave like that because nobody gave you the option.

**How they view the
Military**



Where college life serves as a 4

year **incubation
period**

that 'eases' a parent-dependent
teen into
a self-reliant adult...

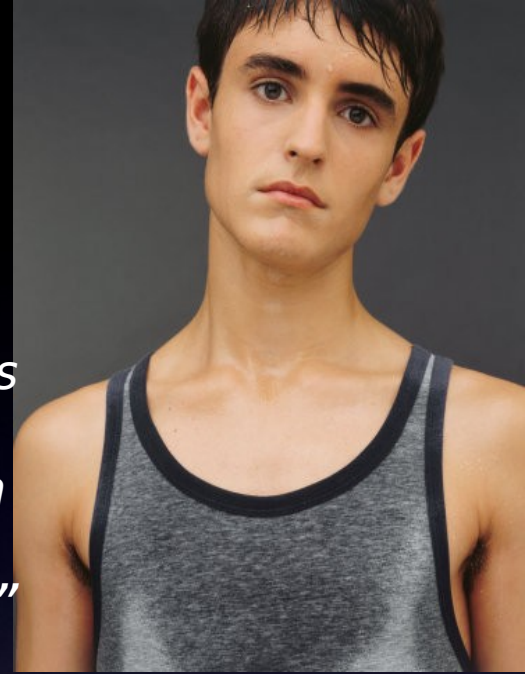




Discipline

Hard work

"(If I join the Navy) I'd miss out on having the excuse of being a college kid and being irresponsible."



The military is seen as getting into the frying pan



"Your schedule is not even your own. It's someone else's."

4 A.M
Wake up call

Wearing
Uniforms



Teen Perceptions of the Navy

Source : 2006 CE - NAVY Qualitative Research on Influencers

Military not On Kids' Radar

Education-Focused

89% want to go full-time or part-time to a college or university.
(2005 TRU)

83% agree that getting an education is very important
(2005 Yankelovich Youth Monitor)

68% agree that going to college is the best way for me to get a job.
(2007 Navy Youth Attitudes Study)

66% agree going to college is the best course of action for those graduating from high school
(2007 Navy Youth Attitudes Study)

The draft ended
34 years ago

A Major Disconnect

Perceptions of People aged 15-21

Military Service

Civilian Job

Experiences that prepare you for a career	14%	27%
Interesting job, not just routine	29%	13%
Work with people you respect	12%	17%
Job where you decide how tasks will be carried out	9%	43%
Something you can be proud of	9%	20%
Earn respect of people who are important in your life	9%	38%
Good paying job that allows you to live comfortably	8%	7%
Receive approval from parents	30%	56%
Have personal freedom	4%	

Fewer adults with military service to recommend the Navy

37%
1980

13%
2004

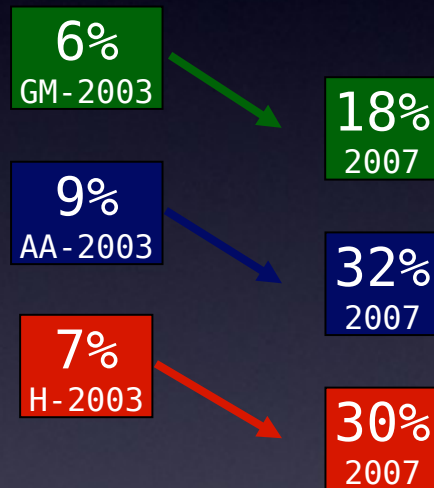
2000 Census Bureau Data

All influencers more likely to recommend school than military service



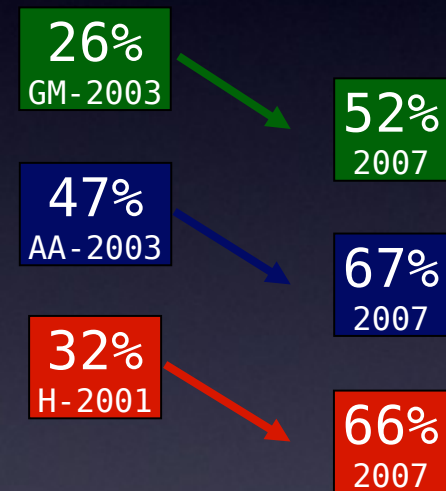
Impact of Iraq War

See themselves as less patriotic



2007 Youth Attitudes Study

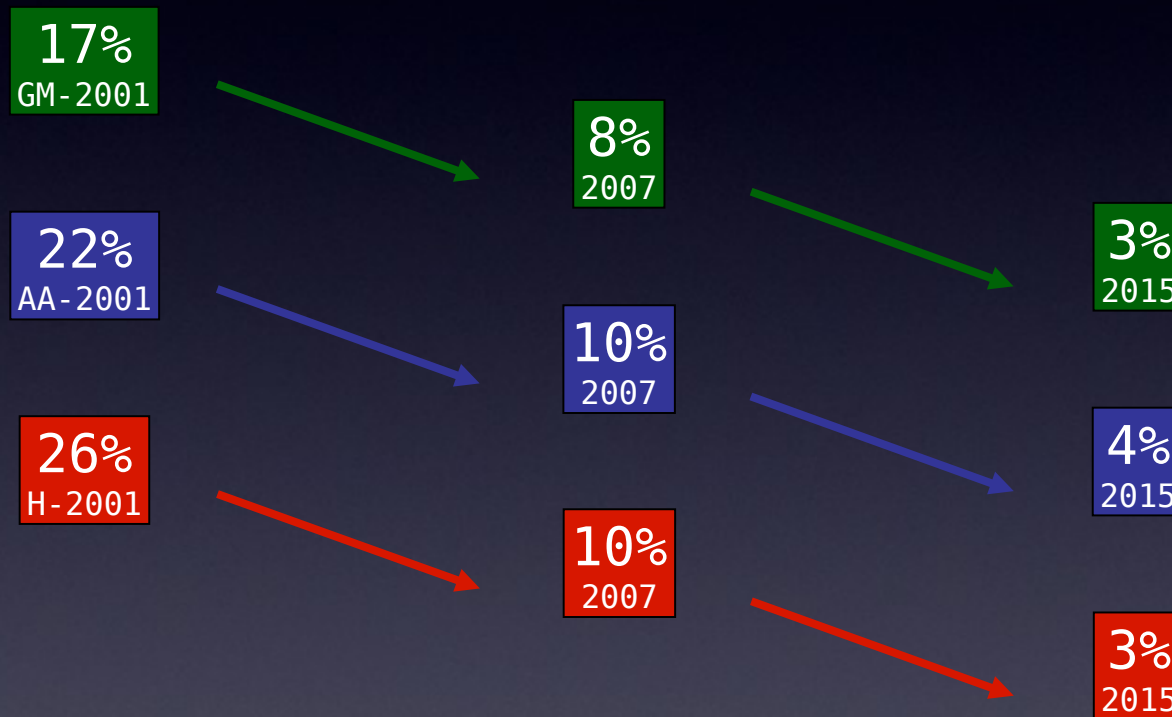
Less likely to join the military



2007 Youth Attitudes Study

Propensity to join the military

Propensity declines expected to continue



2007 Youth Attitudes Study, Projected

Implications for Navy MPT&E

- **Many of their experiences have been second-hand**

- A sizable part of their life has been spent in a virtual world rather than in
- the real world. The television/computer screen has always acted as a
- ‘screen’ that has kept them away from many direct real world interactions.

At first contact, the Navy world is going to be too real to digest – akin to the “The real world” in Matrix

- **They are optimistic, self-confident achievers who question authority**
 - Their 'BS' barometer is very high
 - Status and authority will not impress them, bureaucracy and red tape will frustrate them and a patronizing attitude will drive them crazy
 - Perhaps they'll even expect their parents to "rescue" them.

Teach them. Guide them. Mentor them.
Bull@*#% them, and they will just walk away

- They will be unrealistically impatient

gratification constant

- And praise

They will expect work that is challenging, interesting and that delivers quick results and rewards

- They will demand clarity at work

- Believe in getting a simple answer

Tell it like it is. They have an aversion towards ambiguous situations—and ignoring an issue won't go well with them

- **They will expect an environment that is open and transparent**
 - No matter what, Navy experiences will only be a Google search away
 - They will want to manipulate, remix and share content with others - even about their work with their friends/parents

Expect them to share their Navy experiences to the world. Some of them may not be worth bragging about

- **In their world, they expect control over everything**
 - When/where they talk to friends, watch shows, listen to music, etc...

The Navy will constitute a world where the control is directed and not taken for granted. This concept can be scary...

- **Most of their learnings have been experiential, tactile, and visual**
- Video games, multi-tasking on their gadgets, etc

Provide Experiential and Interactive learning

The aging infrastructure and the lecture tradition of colleges and universities are not meeting the expectations of these students raised on the internet and interactive games. A growing number of college professors are using film, audio clips and Power Point presentations to play to their student's strengths and capture their evanescent attention

- **They learn best via trial-and-error method**

- Video games symbolize a trial-and-error approach to solving problems; losing is the fastest way to master something because losing provides learning

More logical, rule-based approach to solving problems might not go well with them.

They may fail many times before they master their work

- **Their social network will be their lifeline**

- When they need help they expect to 'ping' their buddy list on their networks
- Their conversations never end in their "always on" world

They may not be ready to be uprooted from their "network" of friends

and family members

They will need a large "social system" in place that will provide them

with a lifestyle that comes close to the life that they have left behind

- **They will not be necessarily be looking for a long-term career.**

Their parents' employers may have had no allegiance to them. Downsizing, no pension, even disappearing industries

If the work is meaningful and challenging, they may well become long-term employees

**Consider reverse
mentoring now**

**Remember how the
previous generation
misunderstood you?**

**Try not to do it to
them**